RESEARCH

2002 U.K. ADVERTISING EVALUATION STUDY

Evaluation report 2003-1

Discover our true nature

CANADIAN TOURISM COMMISSION
COMMISSION CANADIENNE DU TOURISME

Canada

104-04342/

2002 U.K. Advertising Evaluation Study

Prepared for:

The Canadian Tourism Commission (CTC)

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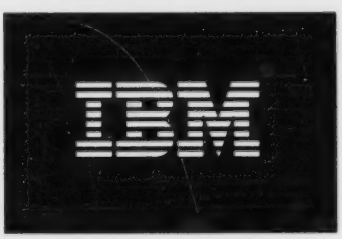

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Executive Summary

The Canadian Tourism Commission (CTC), in conjunction with several partners, launched a major new television campaign in the U.K. in 2002/2003. IBM Business Consulting Services was commissioned to conduct an evaluation study to determine the effectiveness and impact of this advertising on the marketplace. Highlights of this study are presented below.

Advertising Awareness

- Immediately following the CTC's campaign, unaided awareness of travel-related advertising for Canada stood at 9 per cent, while aided awareness hit a very respectable 38 per cent.
- However, unaided awareness of advertising for competitors such as the U.S. (24%), Australia (19%) and the Caribbean (14%) were far higher than for Canada, which shows there is intense competition for the attention of U.K. travellers. For this reason, Canadian advertising may not be top of mind.
- Awareness of CTC-specific television advertising was very high at 23 per cent, which translates into almost 2.3 million long-haul travellers who saw the CTC campaign.
- "Canada" was clearly the major brand recognized within the U.K., with little recollection of advertising for the individual provinces on an unaided basis.

Audience Impressions and Recall of the Advertising

- Viewers of the CTC television advertising rated it highly on visual appeal (94%), creating interest (91%) and being informative (81%). More than half (57%) felt it was better than other travel ads they had seen on television. However, ratings of the ads' uniqueness were below par.
- The images retained by viewers from the advertising for Canada were almost exclusively related to nature and the outdoors, which is consistent with the imagery contained in the CTC ads.
- When asked to recall specific destinations from the advertising for Canada, British Columbia, Ontario and Alberta were the most frequently mentioned provinces. There was also a good measure of awareness for cities such as Toronto and Vancouver.

Destination Awareness, Travel Intentions and Perceptions of Canada

- Unaided awareness of Canada as a long-haul holiday destination was 20 per cent, placing it fifth behind the U.S., Australia/New Zealand, Asia and the Caribbean.
- Within Canada, awareness was again highest for the "Canada" brand (14%), followed distantly by Ontario (1.7%) and British Columbia (1.1%).
- About 8 per cent of respondents, or potentially 791,000 long-haul travellers, reported that they are likely to visit Canada within the next 12 months, with Ontario (80%), British Columbia (77%) and Canada's East Coast (68%) being the destinations of choice.

- The major travel barriers in this market of sophisticated travellers were the appeal of other destinations, the desire to see new places, and the perceived expense of travelling to Canada. Interestingly, concern about terrorism and the war in Iraq were largely insignificant factors, being mentioned by only 1 per cent of respondents.
- Canada is generally perceived by potential travellers as a diverse and unique vacation spot, offering lots to see and do (82%) and opportunities to see something different (80%). Not surprisingly, it is also viewed as a strong outdoors (81%), active (75%) and nature (70%) destination.

Impact of the CTC Television Campaign

- The CTC campaign positively influenced audience attitudes towards Canada, with those who saw it feeling more positive about Canada as a travel destination (73%) and more likely to vacation there in there future (68%).
- The campaign also generated an immediate audience response, prompting 12 per cent of those who saw it (or close to 276,000 long-haul travellers) to seek additional information on Canada, largely through the internet and travel guides.
- Approximately, 1.4 per cent of all advertising viewers had taken or booked an immediate trip to Canada in the weeks following the campaign.
- The CTC advertising significantly enhanced awareness of Canada among viewers, with awareness at 28 per cent among those who saw the campaign, compared with only 18 per cent among non-viewers. Similarly, the advertising boosted the likelihood of visiting Canada among viewers (25% vs. 16% for non-viewers).
- Consistent with the overall campaign objectives, the advertising also appeared to improve viewer perceptions of Canada as a trendy and exciting vacation spot (although the sample size was too small to be conclusive).

1. Introduction

The Canadian Tourism Commission (CTC), in conjunction with several partners, launched a major new advertising campaign in the U.K. in 2002/2003. A key component of the campaign was a series of 40-second television advertisements that were broadcast between December 26, 2002 and February 16, 2003. This advertising was supported by a number of partners, with each ad featuring a different partner to the campaign. Provincial partners included British Columbia, Alberta, Ontario and Atlantic Canada. The airline partner was Air Transat, and the tour operator partners were Travelpack and Globespan.

The overall objectives of this year's U.K. television advertising were to create awareness of the Canada brand, to promote specific partner offers, and to generate inquiries and response from the target audience. In contrast to previous years, the advertising was more tactical and focused on response rather than on general awareness building. The theme of the television initiative, which positioned Canada as an exciting, trendy destination with diverse experiences, was *Play in Canada.*

Being the first new television campaign to be launched in this market in over three years, the CTC recognized the importance of assessing the effectiveness and impact of the advertising on the marketplace. As a result, IBM Business Consulting Services was commissioned to conduct an advertising evaluation study in the U.K., with a conversion study to come later in the year.

This report presents the key findings of the evaluation study, including advertising awareness, audience impressions and recall of the advertising, awareness, travel intentions and perceptions of Canada, the impact of the advertising campaign, and audience demographics.

Methodology

For this evaluation study, a total of 1001 interviews were conducted with U.K. residents between February 10 and February 21, 2003. The target population for the survey was adults aged 25 to 64, earning median or above incomes, that have either taken a long-haul pleasure trip in the past three years or intend to take one in the next two years.

Respondents were randomly selected from the general population on a nationally representative basis, with those meeting the target criteria proceeding to the survey itself. A copy of the evaluation questionnaire can be found in ***Appendix I***.

The results for the advertising evaluation study are accurate to plus or minus 3.1 per cent, 19 times out of 20. The margins of error are correspondingly higher for specific sub-groups (e.g., those who saw the CTC television advertisement).

In reading the report, there are two things to keep in mind:

- A pre-advertising wave was not conducted prior to the start of the campaign, so there is no baseline against which to measure the post-advertising wave results. This makes it difficult to assess the extent to which the ad actually improved market awareness and interest in Canada.
- Unlike past evaluation studies that were focused on the general population, the survey population for this year's study was the specific target audience for the advertising campaign. Thus the overall study results are not directly comparable with previous studies.

2. Advertising Awareness

Awareness of Advertising for Canada

Exhibit 1 presents the results for awareness of advertising for Canada as a vacation destination. In terms of ***unaided awareness*** (i.e., respondents were asked to name the countries for which they had seen or heard any destination advertising in the last two months), 9 per cent of respondents were aware of recent destination advertising for Canada.

When asked specifically if they had seen or heard any destination advertising for Canada in the last two months (***aided awareness***), 38 per cent indicated that they had. Of those surveyed, 23 per cent indicated that they had seen the CTC television advertisements. Given the population of travellers in the U.K. (9.9 million aged 25 to 64 with above median incomes), this translates into almost 2.3 million long-haul travellers who claimed to have seen the CTC television ads. About 1.2 million (or 12%) said they definitely saw the CTC television ad, while another 1.1 million (or 11%) think they saw it.

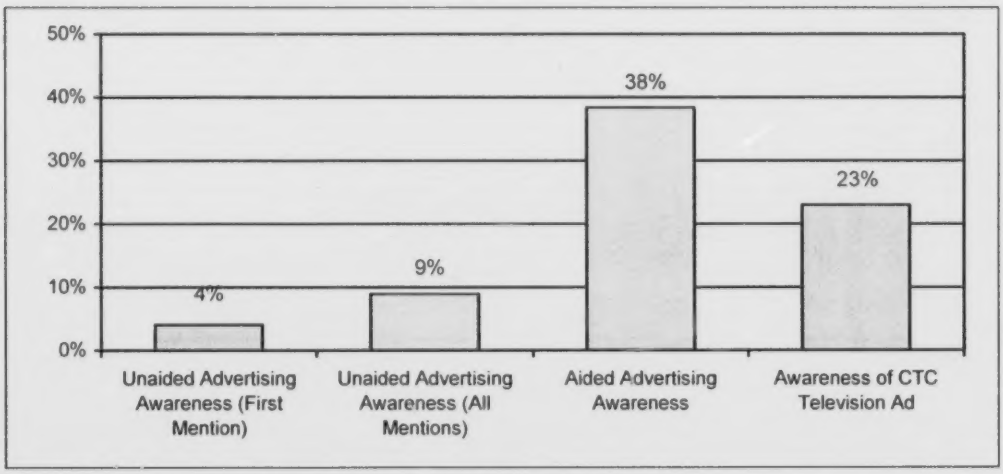

Exhibit 1 – *Awareness of Travel-Related Advertising for Canada*
Base: (n=1001)

The CTC's specific target market in the U.K. consists of travellers aged 30 to 54. In total, there were 739 people in the sample meeting this age criterion. ***Exhibit 2*** shows that awareness was no different among the 30-54 target group when compared with the broader survey population (25 to 64). In general, the results show that overall awareness of the television campaign in the U.K. was very strong, with nearly one-quarter of the target audience who saw it.

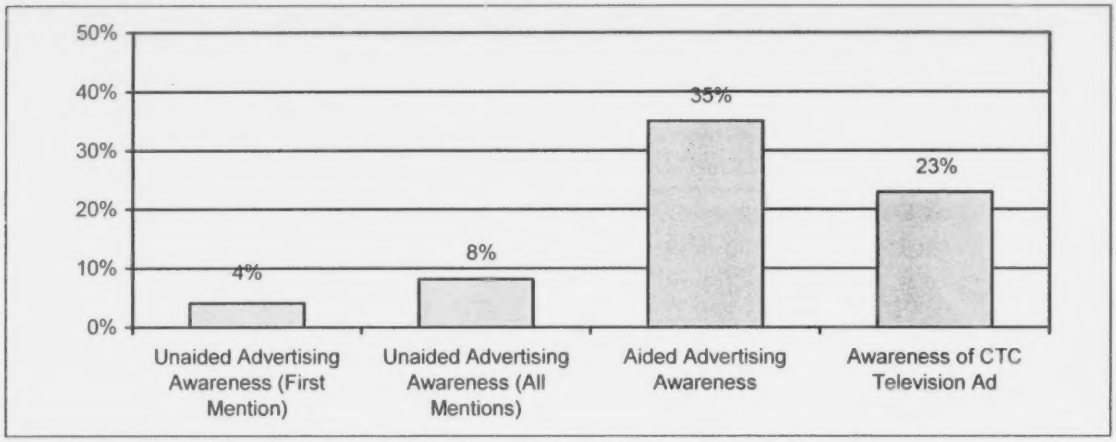

Exhibit 2 *– Awareness of Travel-Related Advertising for Canada Among Target Audience*
Base: Travellers aged 30-54 (n=739).

Awareness of Competitor Advertising

Unaided advertising awareness levels for different long-haul destinations are presented in ***Exhibit 3***. The U.S. was the top destination in terms of advertising awareness in the U.K., with 24 per cent of respondents mentioning that they had seen advertising for U.S. destinations. This was followed by Australia/New Zealand (19%), and the Caribbean (14%). Canada ranked fifth at 9 per cent.

This shows that there is intense competition among long-haul destinations for attention from U.K. consumers. The crowded advertising space may explain, at least in part, why advertising for Canada was only top-of-mind (i.e., mentioned first) for 4 per cent of the overall market.

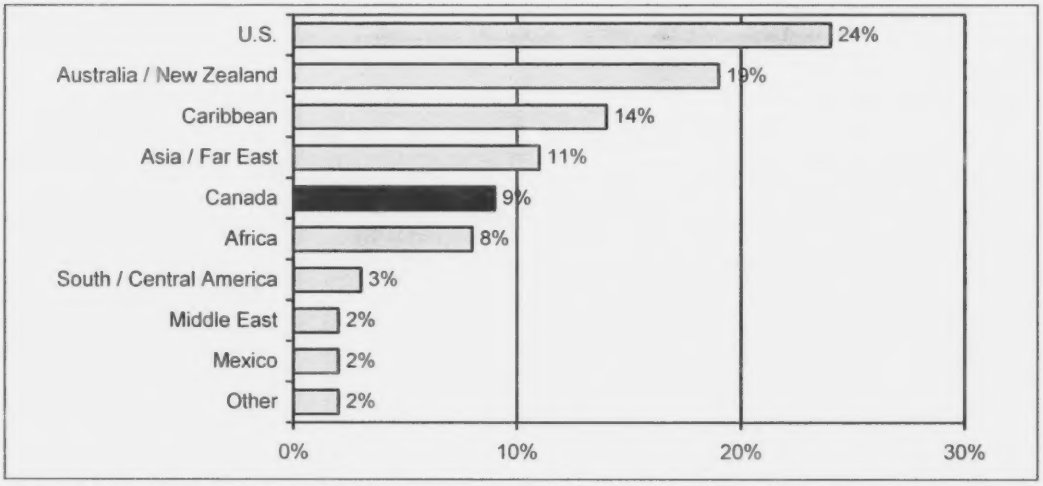

Exhibit 3 *– Unaided Advertising Awareness for Long-Haul Destinations (All Mentions)*
Base (n=1001)

Awareness of Advertising for Canadian Destinations

Exhibit 4 shows unaided advertising awareness levels for different Canadian destinations. A general mention of "Canada" was most common (6%), followed by British Columbia (1%) and the Rocky Mountains (0.9%). This shows that "Canada" is the major brand recalled in the U.K., with little awareness of advertising for individual provinces.

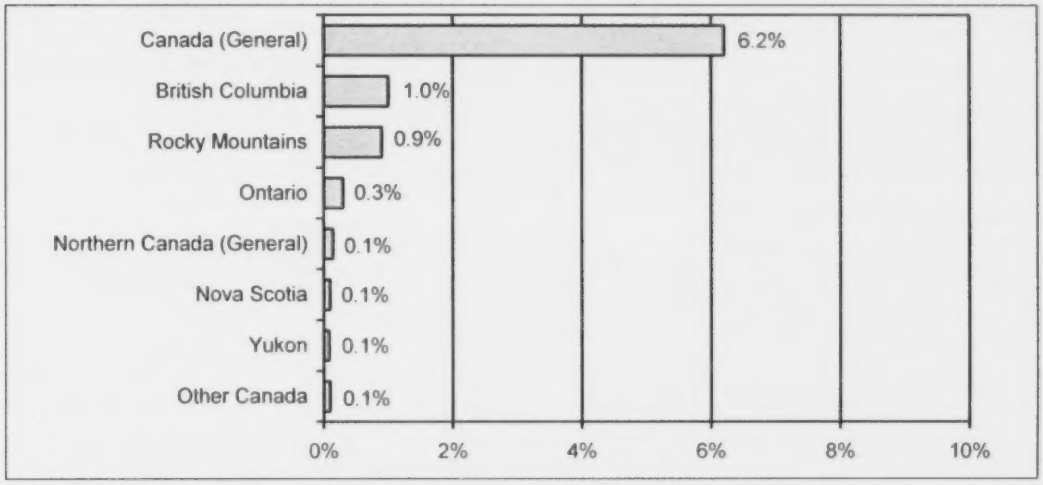

Exhibit 4 – *Unaided Advertising Awareness for Canadian Destinations (All Mentions)*
Base (n=1001)

Media Recall

Respondents who indicated that they had seen or heard advertising for Canada were asked in which media they had seen or heard the advertising. ***Exhibit 5*** presents the results for unprompted recall of sources of Canadian travel advertising. The Exhibit shows that respondents were more likely to have seen Canadian travel advertising on television (56%) than in any other media source.

Awareness of newspaper advertising for Canada was also fairly strong at 39 per cent. The CTC's spring newspaper campaign had just begun in the U.K., with three insertions in mid-February. The strong preliminary showing for the newspaper advertising bodes well for the rest of the campaign, which runs through April and May.

Notably, almost 4 per cent mentioned the internet as a source of advertising for Canada, even in the absence of a formal CTC campaign (the online banner ads do not begin until March). This is much higher than in previous studies, which points to the rising importance of the internet as a marketing tool.

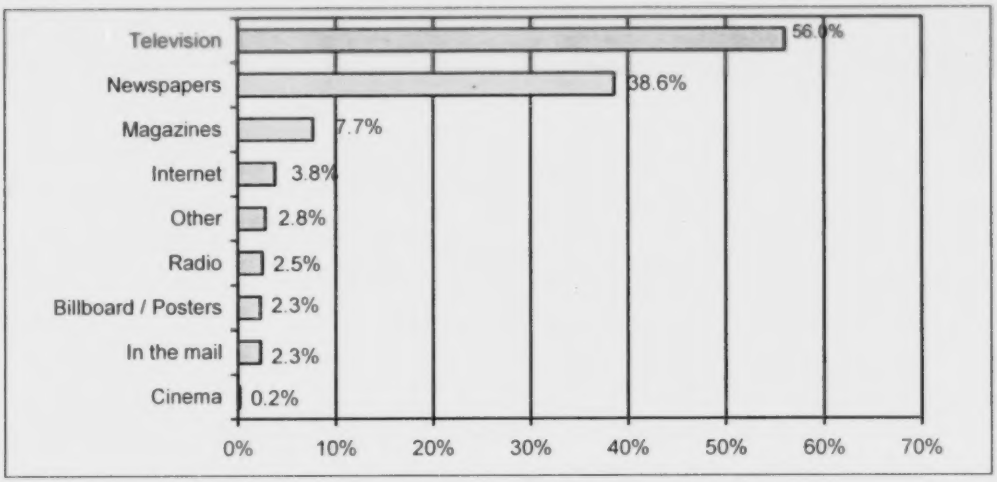

***Exhibit 5** – Media in Which Advertising for Canada Was Seen or Heard*
Base: Those who saw advertising for Canada (n=376)
Note: Percentages add to more than 100 per cent due to multiple responses

3. Audience Impressions and Recall of the Advertising

Impressions of the Advertising

Impressions of the CTC television advertisements were generally very positive, with 94 per cent agreeing that the ads were visually appealing, and 91 per cent saying they were interesting (see ***Exhibit 6*** below). The majority of respondents also thought that the ads were informative, which suggests that they not only grabbed viewers' attention with the visuals, but managed to inform and create interest at the same time. Overall, a majority of respondents (58%) indicated that the ads were better than other travel advertisements that they had seen on television.

It is worth noting that viewers assigned a lower rating for uniqueness, with just over half who felt the advertisements were unique. This is somewhat lower than in past campaigns, and may explain why 43 per cent of viewers felt the advertising was unmemorable.

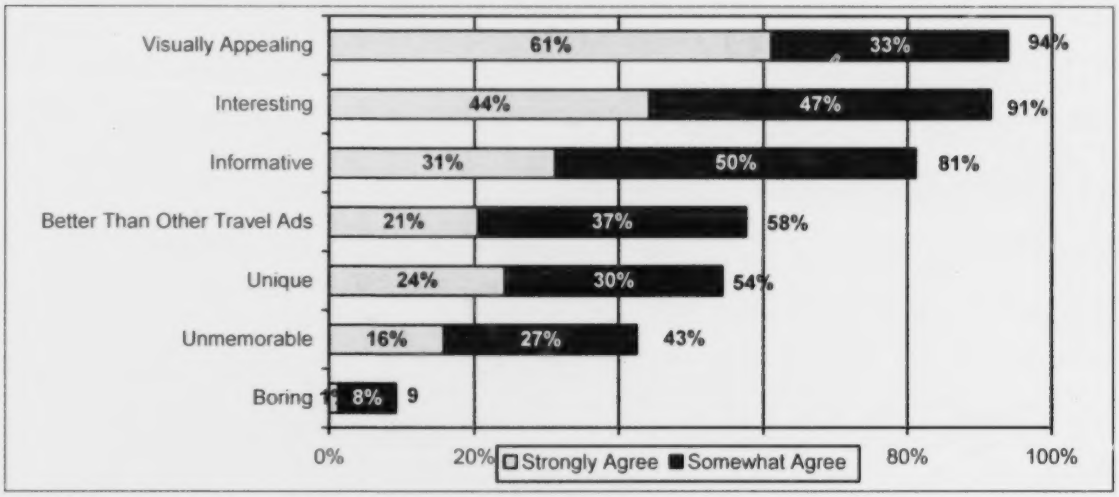

***Exhibit 6** – Impressions of CTC Television Advertisements*
Base: Those who saw CTC television advertisements (n=224)

Image and Destination Recall

Those who saw the television advertising for Canada were asked to recall images from the advertising. ***Exhibit 7*** shows the top 10 images of Canada recalled by respondents. Over one-quarter (27%) of respondents remembered images of mountains, while a fifth (20%) recalled images of scenery and the outdoors. In fact, the top five images recalled, and seven of the top ten, related to "nature." This is consistent with the content of the CTC television ads, which featured extensive imagery relating to nature and outdoors activities. This suggests that the *Discover our True Nature* message definitely hit home with the target audience.

Although the CTC ads also featured a fair amount of urban imagery, these images were less likely to stay with viewers, with only cities/skylines placing among the top 10 images recalled.

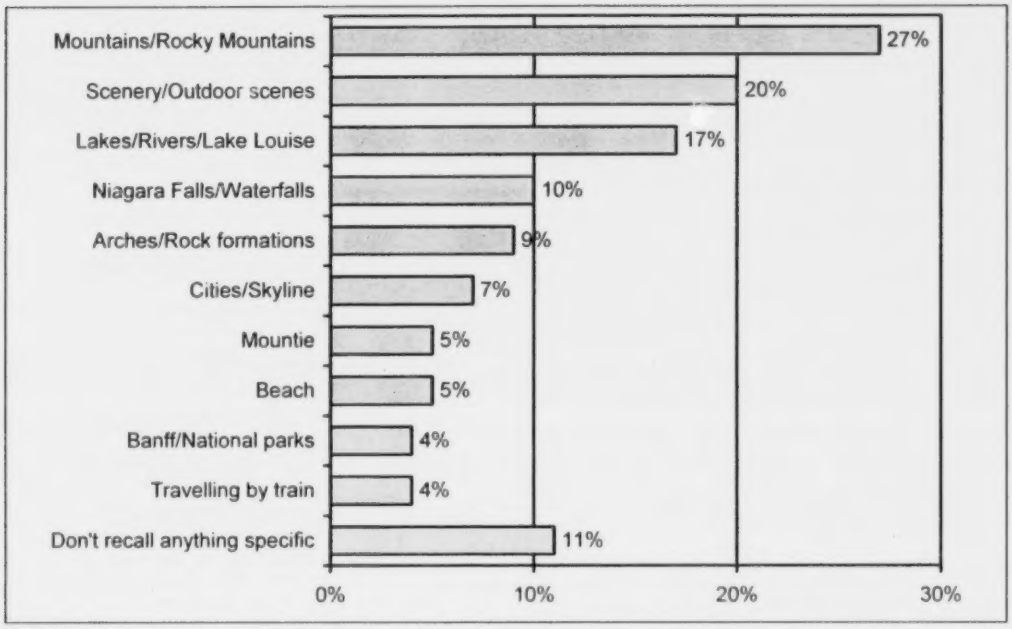

Exhibit 7 *– Unaided Recall of Images from Television Advertising for Canada*
Base: Those who saw television advertising for Canada (n=232)
Note: Percentages add up to more than 100 per cent due to multiple responses.

Travellers who reported seeing the television advertising for Canada were also asked to recall the specific provinces or destinations featured in the advertising. ***Exhibit 8*** shows the results.

Figuring prominently in the list of recalled destinations are the provinces of British Columbia, Ontario and Alberta, all provincial partners of the CTC. There was also a good measure of awareness for key cities within these provinces, including Toronto (15%) and Vancouver (11%).

Unfortunately, recall was fairly low for the Atlantic region, with results under 2 per cent for all East Coast destinations.

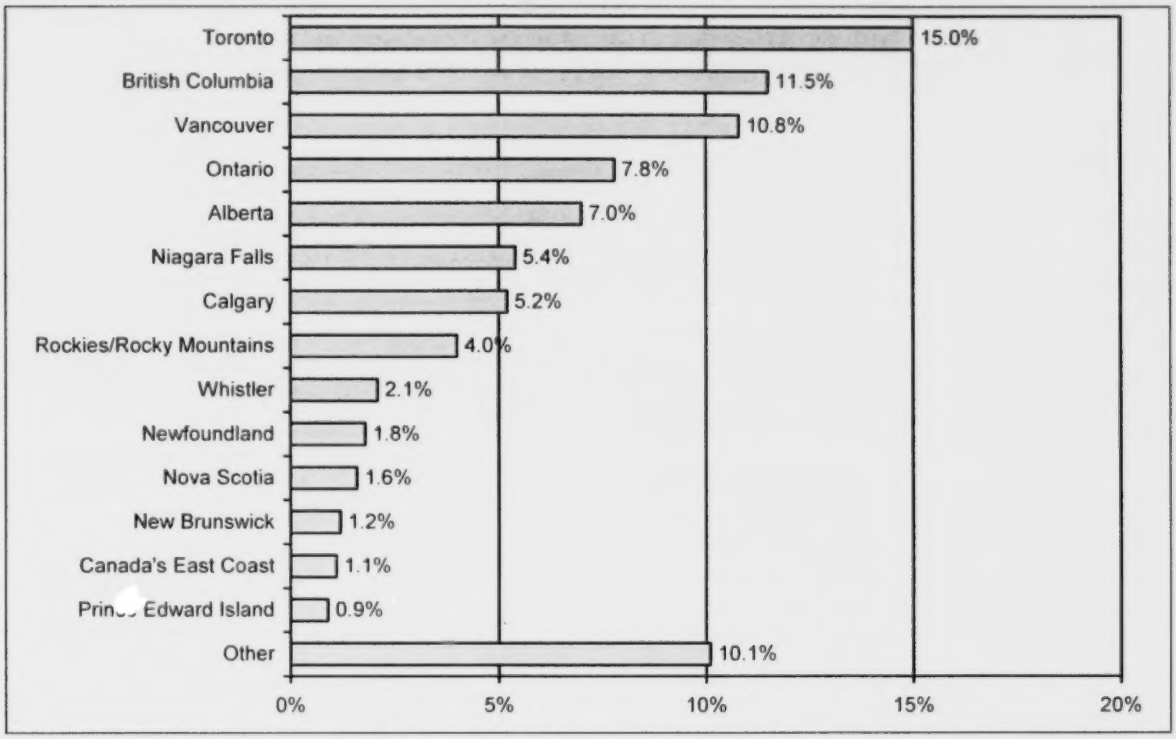

Exhibit 8 *– Unaided Recall of Destinations from Television Advertising for Canada*
Base: Those who saw television advertising for Canada (n=232)

4. Awareness, Travel Intentions and Perceptions of Canada

Destination Awareness

Exhibit 9 below shows unaided awareness of long-haul holiday destinations (i.e., travellers were asked to name places that come to mind for a holiday trip outside of Europe and the Mediterranean). The U.S. was clearly the most frequently mentioned destination, at 56 per cent of all respondents. Market awareness was also fairly high for Australia, Asia and the Caribbean region.

Canada was mentioned by 20 per cent of respondents, ranking it as the fifth most frequently mentioned holiday destination (and not that far behind the Caribbean). Based on a population of 9.9 million potential travelers aged 25-64 with above median incomes, the 20 per cent represents close to 2 million U.K. long-haul travellers who are aware of Canada as a travel destination.

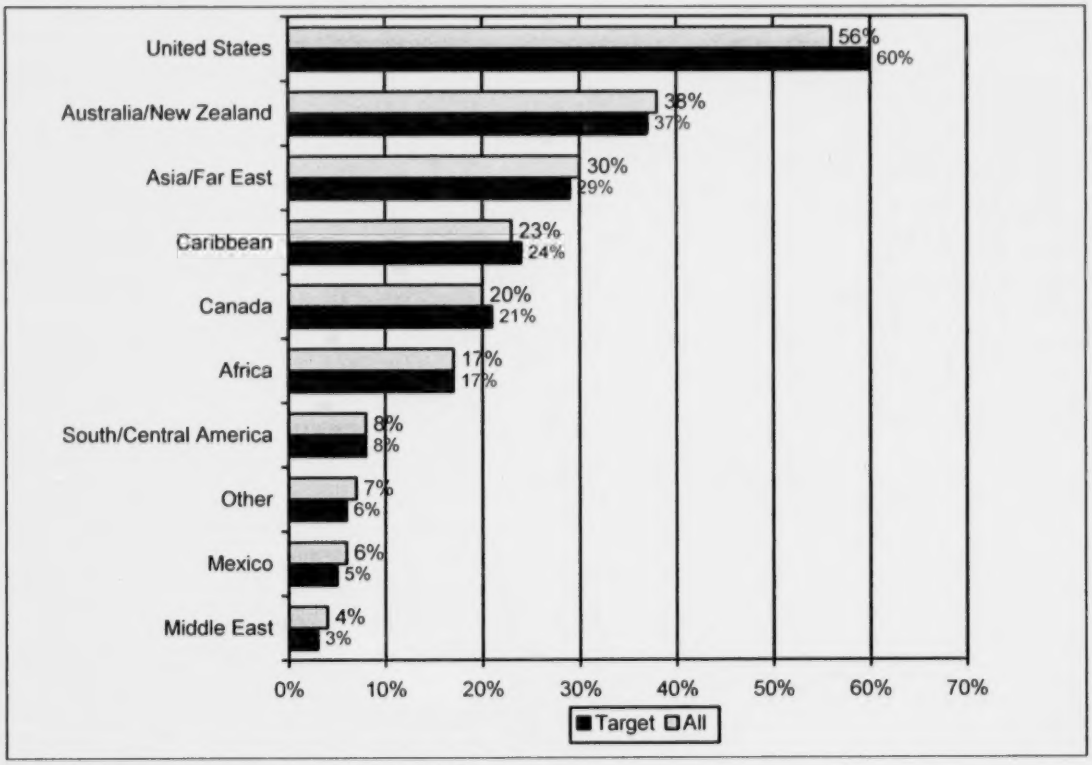

Exhibit 9 – *Awareness of Long-Haul Holiday Destinations*
Base: All respondents 25-64 (n=1001); Target population 30-54 (n=739)

Exhibit 10 shows unaided awareness of Canadian holiday destinations. "Canada" in general was by far the most frequently mentioned response among respondents at 14 per cent. In fact, specific destinations within Canada were each mentioned by less than 2 per cent of all travellers. In other words, "Canada" clearly dominates in terms of brand awareness, with very low awareness of the provincial brands in this market.

By combining all mentions of Atlantic Canada destinations, awareness of the East Coast rises slightly to 0.4 per cent for all respondents, and 0.6 per cent for the CTC's target population. Similarly, combined awareness of all Northern Canadian destinations rises to 0.4 per cent for both groups.

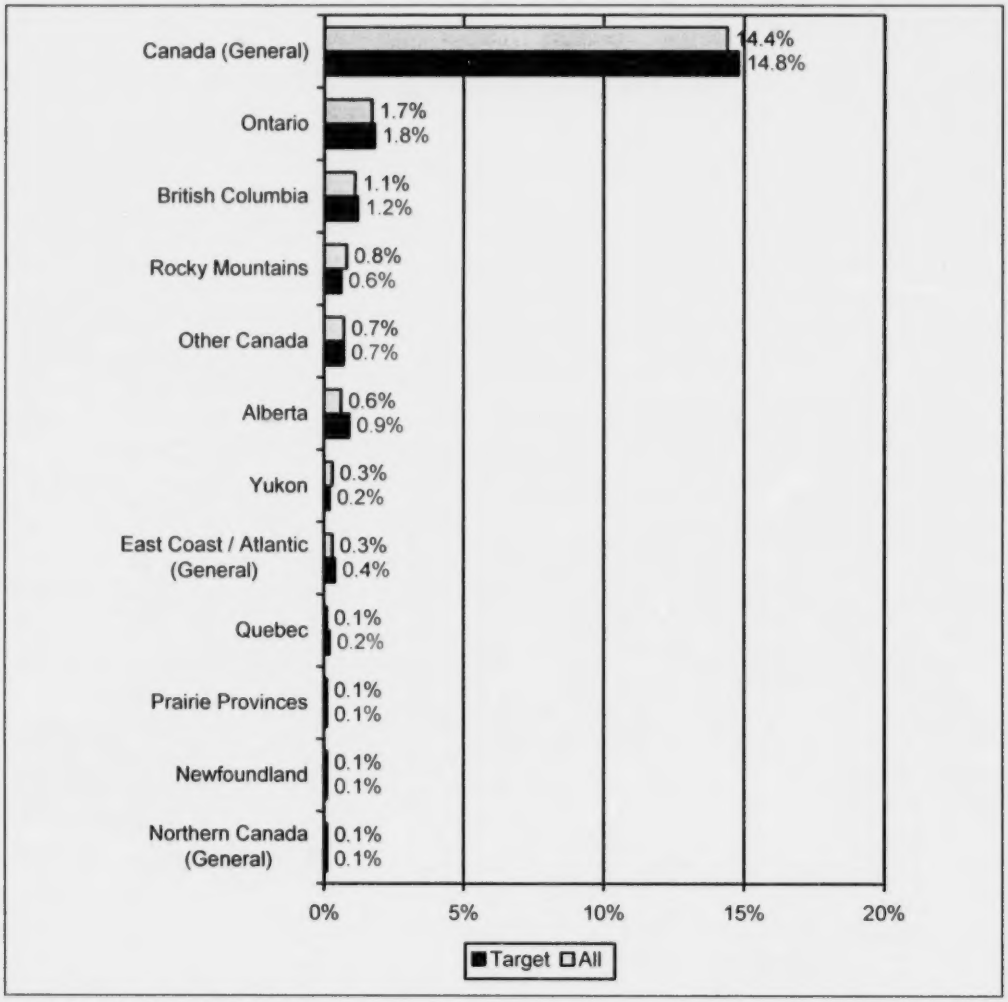

Exhibit 10 – *Unaided Awareness of Canadian Destinations*
Base: All respondents 25-64 (n=1001); Target population 30-54 (n=739)

Future Travel Intentions

In order to gauge their future travel intentions, respondents were asked to state the likelihood of visiting Canada in the next 12 months. ***Exhibit 11*** shows that 8 per cent of all respondents indicated they were definitely planning or very likely to visit. This translates into more than 791,000 long-haul travellers (aged 25-64 with above median incomes) who are planning to visit in the next year, with roughly 249,000 who are definitely planning a trip.

Travel intentions among the CTC's target audience were similar to the broader respondent population. Notably, fear of terrorism or war in Iraq appears not to have affected the overall likelihood of visiting Canada (see ***Exhibit 13*** below).

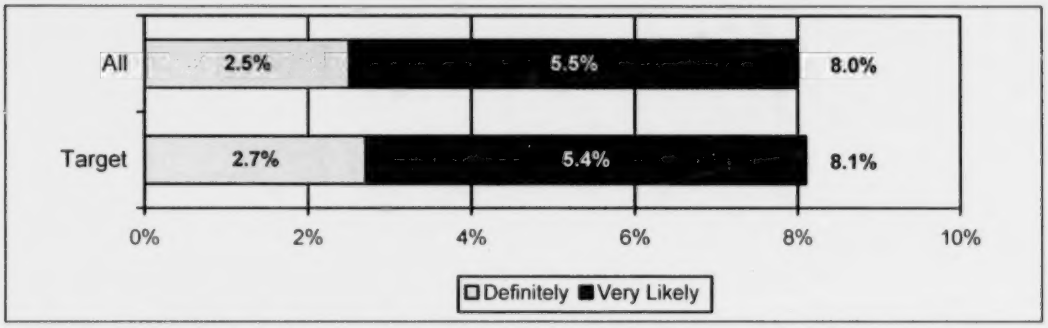

Exhibit 11 – *Likelihood of Visiting Canada in the Next 12 Months*
Base: All respondents 25-64 (n=1001); Target population 30-54 (n=739).

Respondents who were "definitely," "very likely" or "somewhat likely" to visit Canada in the next 12 months were asked to indicate the likelihood of visiting several provincial destinations. ***Exhibit 12*** shows that prospective travellers were most likely to visit Ontario (80% very or somewhat likely to visit), followed closely by British Columbia (77%). As seen earlier, these were also the two top provinces with respect to market awareness.

Although unaided awareness of Canada's East coast and Alberta were fairly low, when specifically asked, well over half of all respondents that were likely to visit Canada said they were likely to visit these destinations.

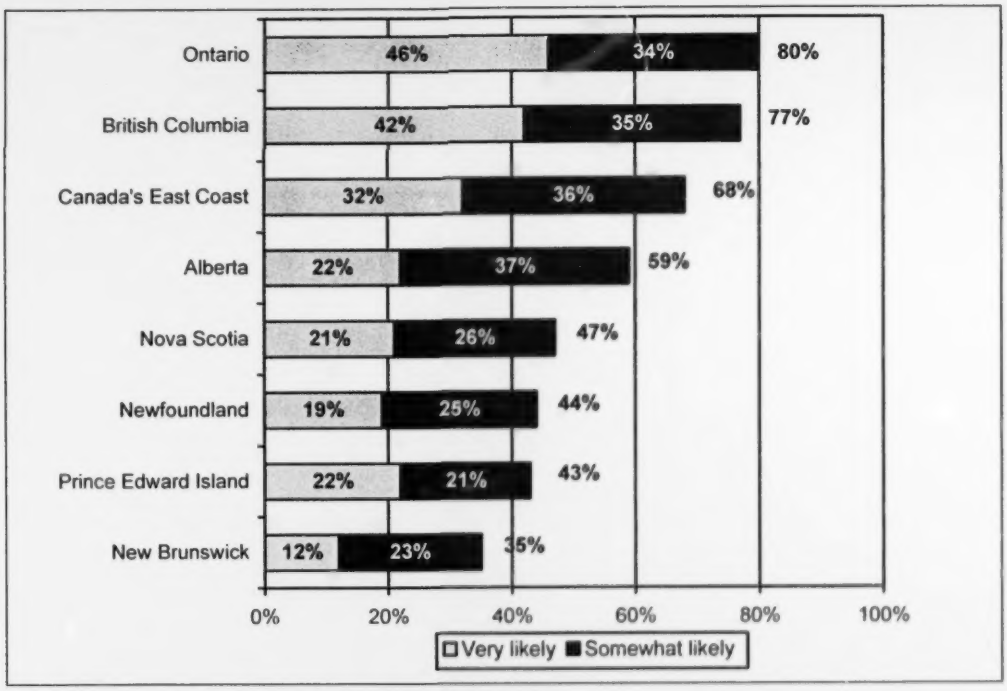

Exhibit 12 *– Likelihood of Visiting Canadian Provinces*
Base: Those who were "Definitely", "Very likely", or "Somewhat likely" to visit Canada in the next 12 months (n=180)

Exhibit 13 shows the most frequently mentioned travel barriers among respondents unlikely to visit Canada in the next 12 months. The most common reason for not visiting Canada, by far, was that there were other destinations the respondent wanted to visit instead (39%). Related to this is the 6 per cent of travellers who had already been to Canada and wanted to move on to other destinations and the 4 per cent who had already booked to go elsewhere. Clearly, heavy competition from other destinations and the desire to see new places is a major barrier in this market of sophisticated travellers.

In addition, perceived high costs were mentioned by 12 per cent of travellers, while 8 per cent noted that there was simply nothing in Canada that appealed to them. Interestingly, fear of terrorism and concern about the war in Iraq were largely insignificant compared to other barriers, being mentioned by only a *small minority* of respondents (1%).

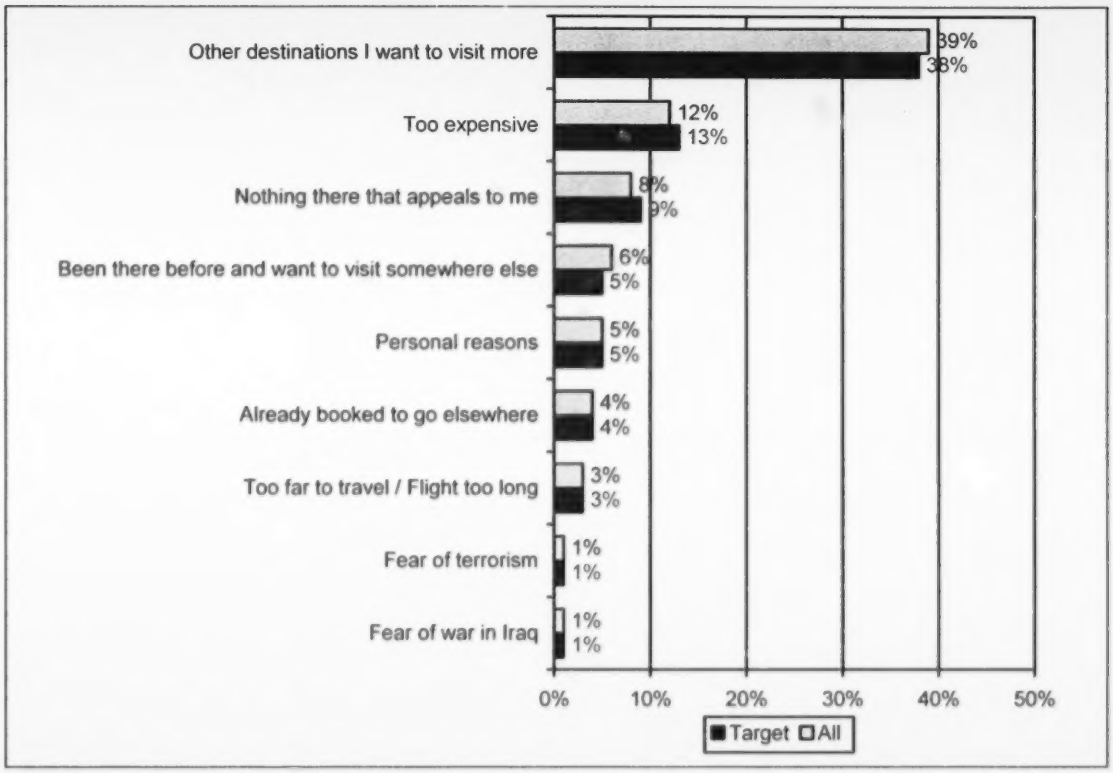

***Exhibit 13** – Reasons Unlikely to Visit Canada*
Base: Those who were not likely to visit Canada in the next 12 months (n=783), Target population (n=578)

Perceptions of Canada

Travellers who said they were likely to visit Canada in the next 12 months were asked to rate a number of attributes to determine how they perceive Canada as a travel destination. ***Exhibit 14*** shows that over 80 per cent believed that Canada has not only many things to see and do, but that it is a place where they are likely to see something they have never seen before. Almost three-quarters also felt that Canada is a place for creating once in a lifetime memories. Notably, diversity and uniqueness of Canada were key messages of the advertising campaign.

Canada is also perceived as a great outdoors destination (81%), a place for being active (75%), and a place for connecting with nature (70%). These messages were also pushed in the television campaign, which was largely focused around images of nature and the outdoors.

Considerably poorer ratings were observed for Canada's city and culture products. Canada is also not viewed by this market as a popular, trendy destination, nor as a place for pampering or romance.

There were no differences in perceptions when compared with the CTC's target population.

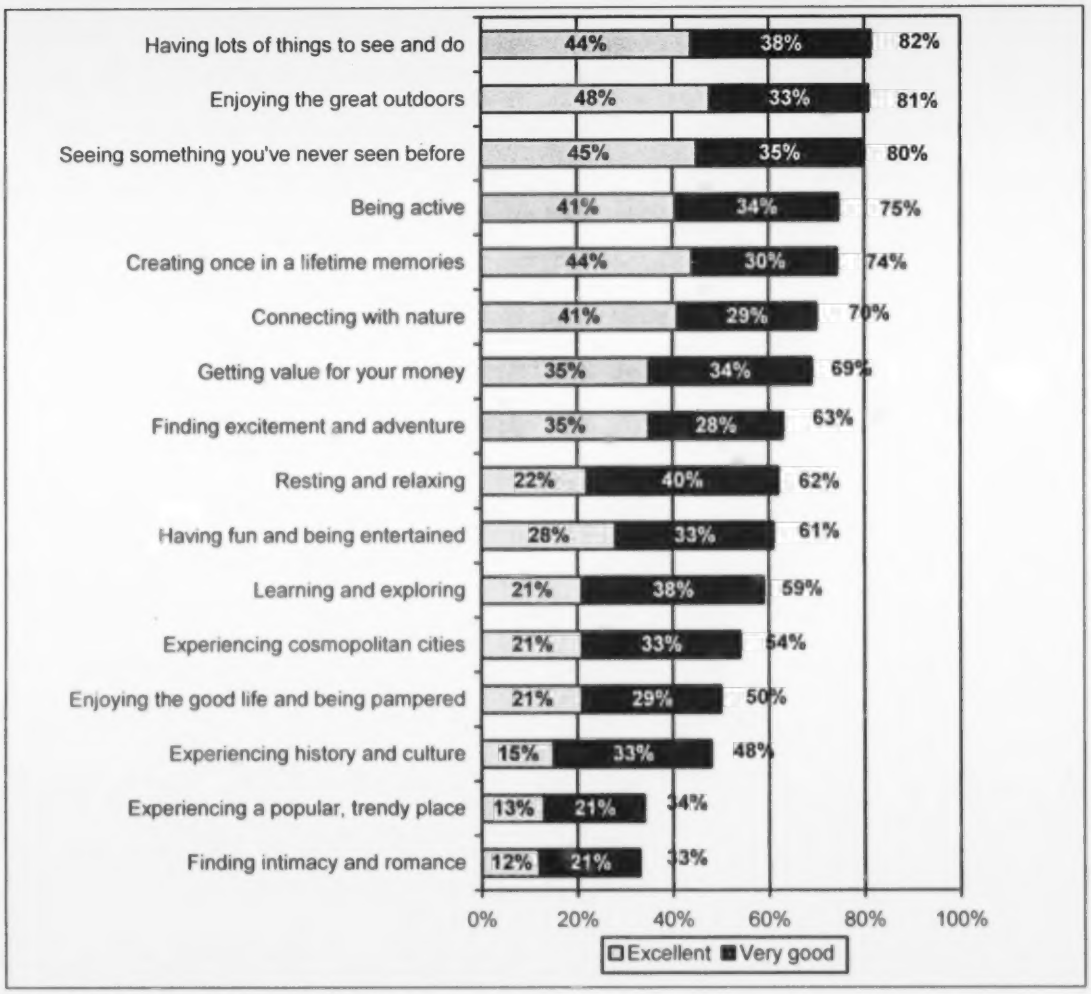

***Exhibit 14** – Perceptions of Canada*
Base: Those who were "Definitely", "Very likely", or "Somewhat likely" to visit Canada in the next 12 months (n=180).

5. Impact of the Advertising Campaign

Attitudinal Impacts

Respondents who saw the CTC television advertisements were asked to rate the impact that the ads had on them. ***Exhibit 15*** shows fairly strong levels of agreement with the three positively framed impact attributes. Almost three-quarters of advertising viewers felt that the CTC ads made them feel more positive about Canada as a vacation destination, and more than two-thirds stated that the ads made them more likely to vacation there. Over two-thirds also indicated that the ads made them aware of new vacation opportunities in Canada. These results clearly show that the campaign had a positive impact on those who saw it.

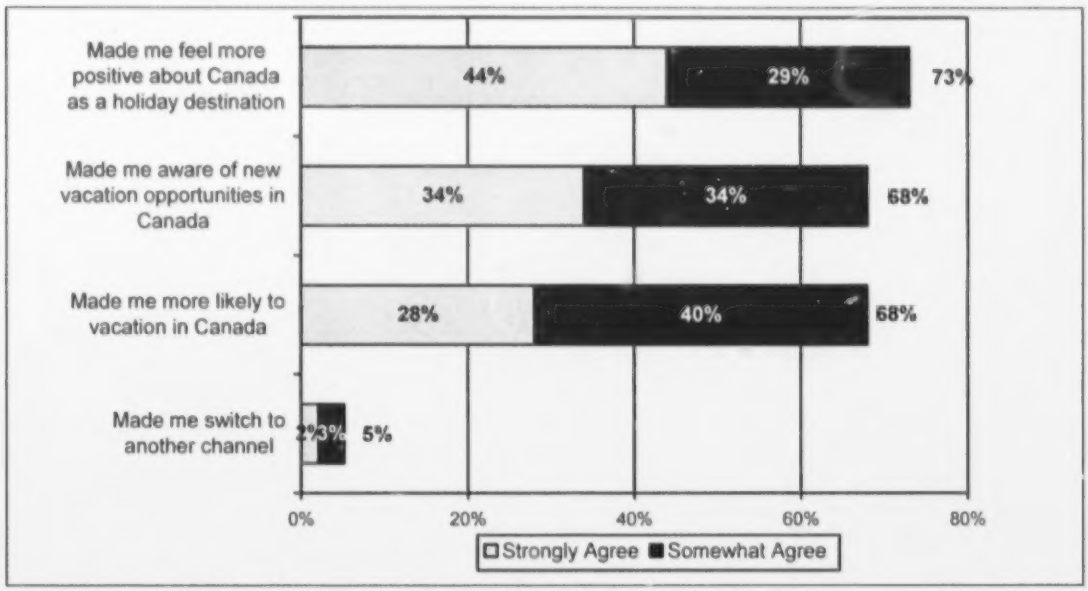

Exhibit 15 – *Attitudinal Impacts of CTC Television Advertisements*
Base: Those who saw CTC television advertisements (n=230).

Actions Taken in Response to the Campaign

Approximately 12 per cent of those who saw the CTC advertising sought additional information on travel to Canada in response to the campaign (see ***Exhibit 16***). This represents close to 276,000 long-haul travellers who responded to the campaign's call for action.

Of these, almost 40 per cent said they visited the internet site indicated in the ad, while close to 60 per cent visited other internet sites relating to Canada. Quite clearly, the internet has become a major source of travel information for this market, with almost twice as many travellers who visited the internet site in the ad than who called the toll-free telephone number (20%). In addition, these results suggest that potential travellers checked more than one site while investigating Canada as a travel destination.

Over 40 per cent of those who sought further information consulted a Canada travel guide, and 30 per cent actually spoke to a travel agent. Approximately 14 per cent claimed to have called one of the tour operators shown in the advertising. These figures should be interpreted with caution due to the small sample size, however, generally they suggest an excellent response to the television campaign.

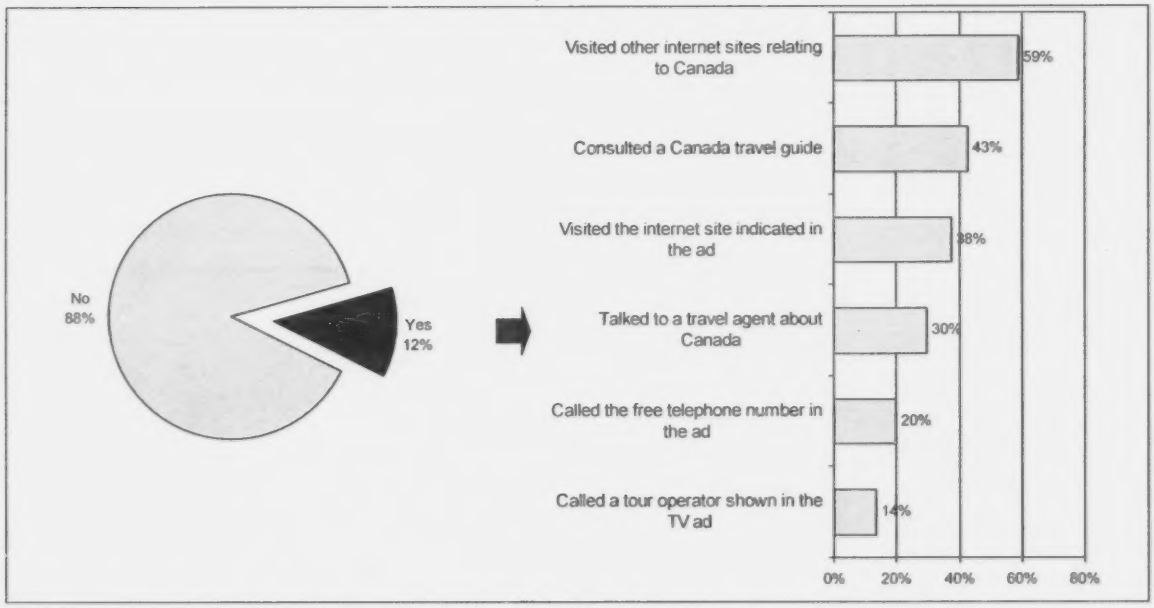

Exhibit 16 – *Information Sources Consulted In Response to CTC Television Advertisements*
Base: Those who saw CTC television advertisements (n=227); Those who sought additional information (n=16).
Note: Percentages for information sources add to more than 100 per cent due to multiple responses.
Results for information sources should be interpreted with caution due to the small sample size.

A primary objective of the advertising is ultimately an uptake on the product or service – in this case, a vacation to Canada. To assess the level of spontaneous trip-taking in response to the CTC television ads, viewers were asked whether they had taken or booked a trip to Canada since seeing the advertising (see ***Exhibit 17***). Only a small proportion of respondents (1.4%) indicated that they had.

This is not surprising given that the survey was conducted only a few weeks following the campaign, providing little opportunity to act on the advertising.

Note that a conversion study will be conducted later this year to provide a better assessment of the trips and revenues generated by the campaign.

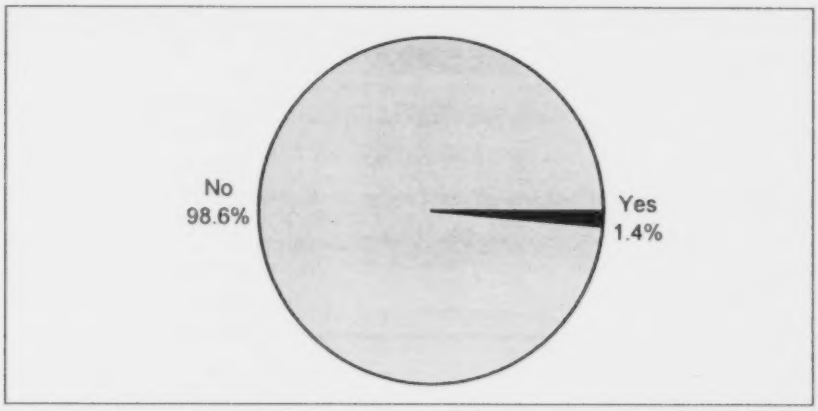

***Exhibit 17** – Taken or Booked a Pleasure Trip to Canada Since Seeing CTC Television Advertisements*
Base: Those who saw CTC television advertisements (n=230).

Impact on Awareness and Travel Intentions

A secondary objective of the advertising was to raise awareness of Canada as a travel destination. As shown in ***Exhibit 18***, there was a significantly higher level of recognition of Canada as a travel destination among those who saw the CTC television ads (28%), compared with those who didn't see the advertising (18%). The same was true for brand awareness, with recall of "Canada" per se significantly higher among advertising viewers (20%) than non-viewers (12%). This suggests that the campaign successfully met its objective of enhancing awareness of the "Canada" brand among those who saw it.

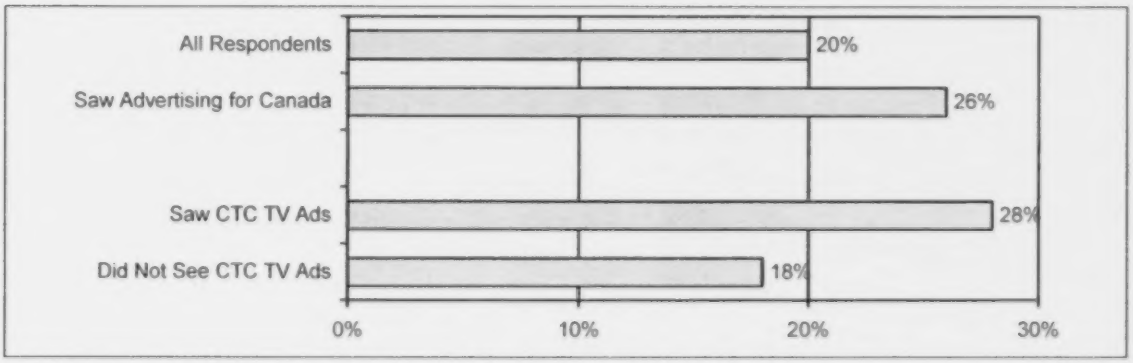

***Exhibit 18** – Awareness of Canada Among Advertising Viewers*
Base: All respondents (n=1001), Saw advertising for Canada (n=376), Saw CTC tv ads (n=230), Did not see CTC tv ads (n=771)

In addition to raising awareness, the advertisements also helped to enhance future travel intentions among viewers. As shown in ***Exhibit 19,*** the likelihood of visiting Canada during the next 12 months was significantly greater for those who had seen Canadian advertising (25%), compared with those who didn't (16%).

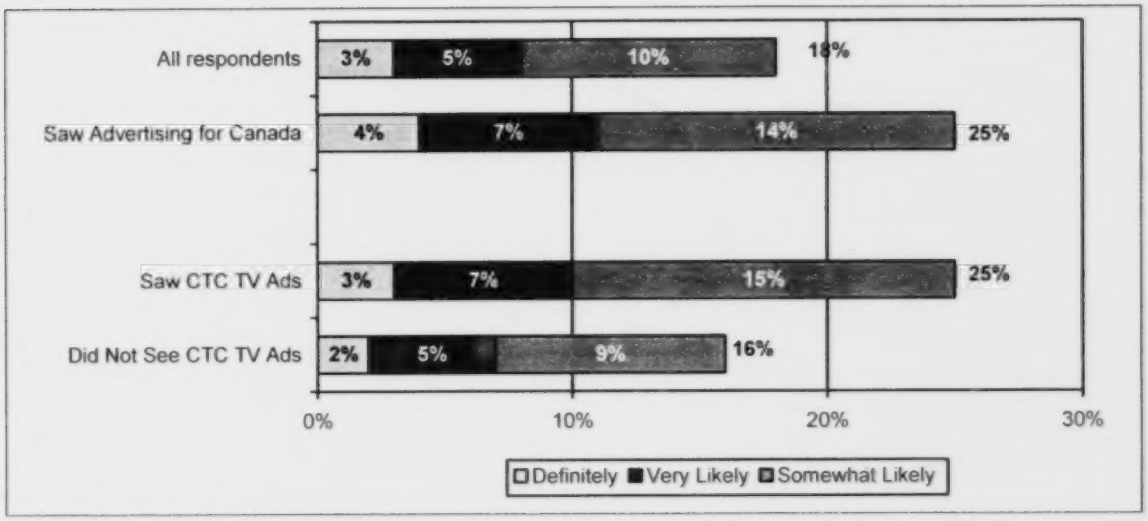

Exhibit 19 – *Likelihood of Visiting Canada Among Advertising Viewers*
Base: All respondents (n=1001), Saw advertising for Canada (n=376), Saw CTC tv ads (n=230), Did not see CTC tv ads (n=771).

As shown in ***Exhibit 20,*** the likelihood of visiting Ontario, Canada's East Coast and Alberta was higher among those who had seen CTC advertising than among those who had not seen it. However, because of the small sample sizes, these differences are not statistically significant. So although the results are not conclusive, the general trend certainly seems to indicate that the CTC advertising helped to enhance travel intentions among viewers for most of its provincial/regional partners.

It should be noted that this is over and above the campaign's impact for Canada overall – in other words, the advertising had specific benefits for the partners beyond enhancing travel intentions for Canada as a whole.

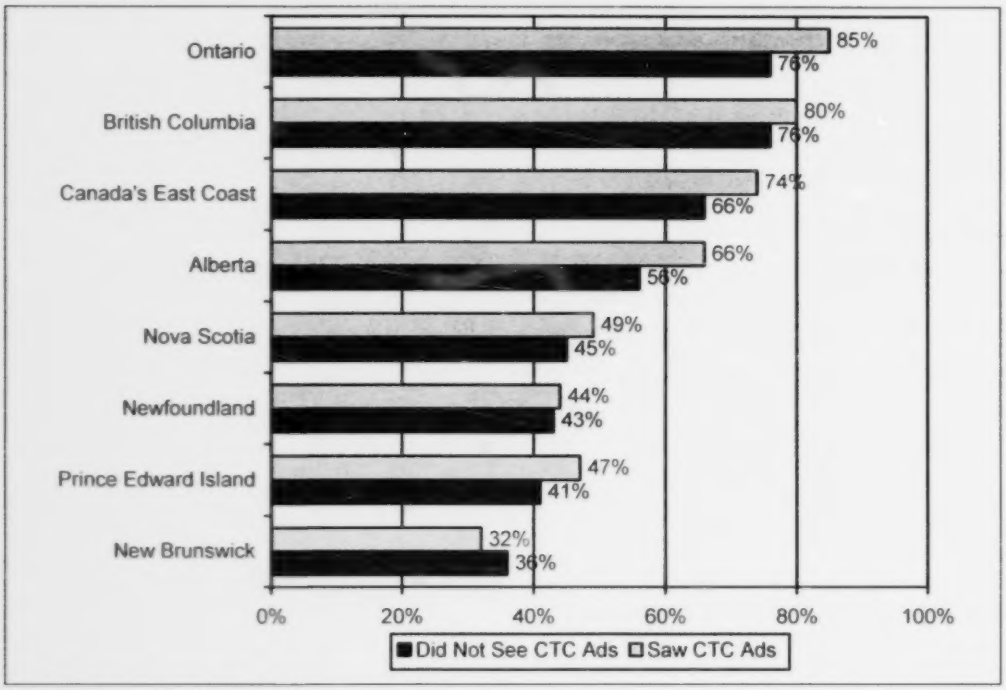

***Exhibit 20** – Likelihood of Visiting Canadian Provinces Among Advertising Viewers*

Base: Those who were "Definitely", "Very likely", or "Somewhat likely" to visit Canada in the next 12 months . Saw CTC tv ads (n=58). Did not see CTC tv ads (n=120).

Impact on Perceptions of Canada

Exhibit 21 shows a number of attributes where perceptions of Canada were higher for advertising viewers vs. non-viewers. Although sample size is also an issue here, with none of the differences being statistically significant, the overall positive trend suggests that the CTC campaign certainly nudged viewer perceptions in the right direction. Notably, cosmopolitan cities, excitement, trendiness and value for money were all among the key messages pushed by the ads.

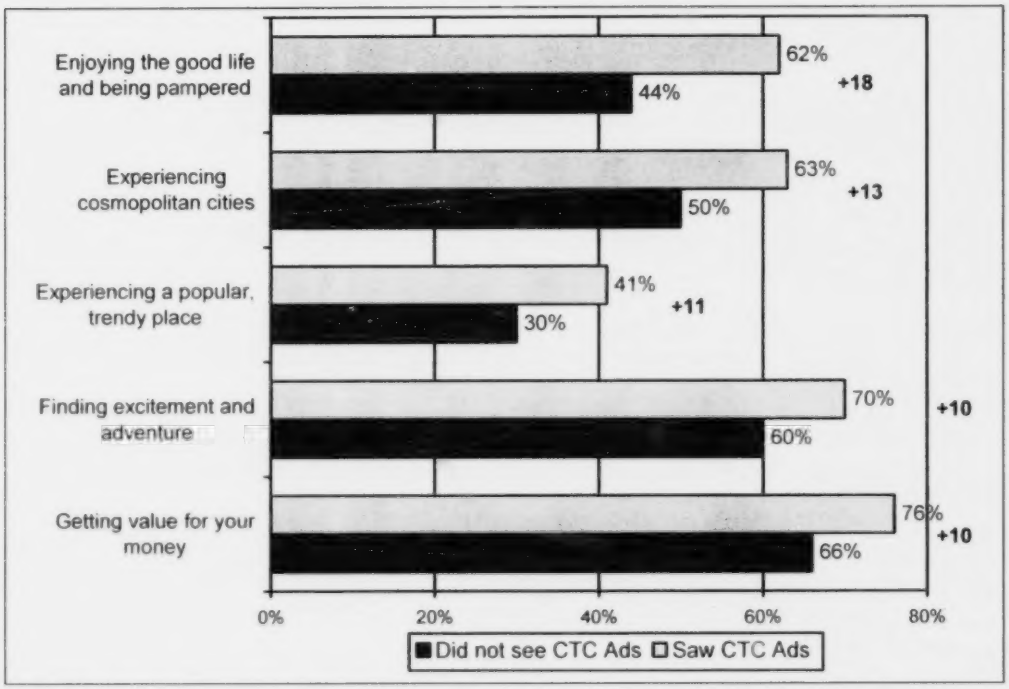

Exhibit 21 – *Perceptions of Canada That Were Higher Among Advertising Viewers*
Base: Those who were "Definitely", "Very likely", or "Somewhat likely" to visit Canada in the next 12 months - Saw CTC tv ads (n=59), Did not see CTC tv ads (n=120)

Product Interests

Respondents likely to visit Canada were asked to indicate how likely they are to take different types of trips in Canada (see ***Exhibit 22***). The overwhelming majority (i.e., in the range of 90%) indicated they are likely to take a city trip. About three-quarters said they are likely to take a nature or touring trip. More than half were interested in Canada's outdoors adventure, culture and winter offerings.

Generally, the advertising did not have an impact on the type of trip that potential travellers to Canada are likely to take. Intentions to take an outdoors adventure trip were somewhat higher among those who saw the ad, but again, not significantly so.

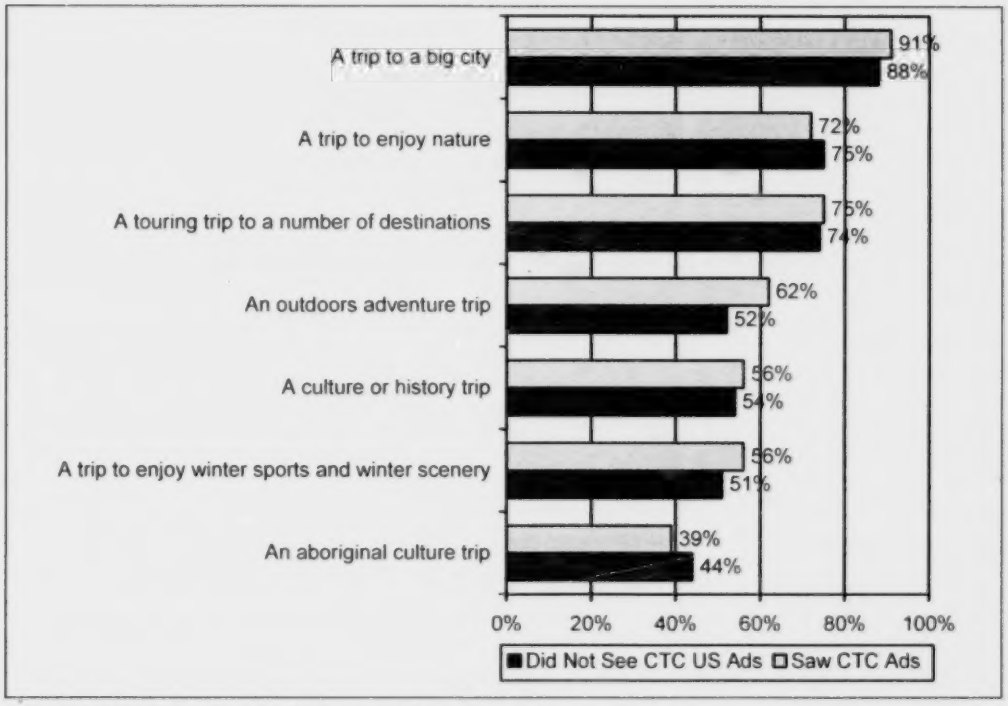

Exhibit 22 – *Likelihood of Taking Different Trip Types in Canada*
Base: Those who were "Definitely", "Very likely", or "Somewhat likely" to visit Canada in the next 12 months - Saw CTC television ads (n=59). Did not see CTC tv ads (n=120).
Note: Percent very or somewhat likely to take each type of trip.

6. Audience Demographics

Exhibit 23 presents an overview of the demographics of the survey respondents (long-haul travellers aged 25 to 64 with above median incomes), as well as those who recalled seeing the CTC television ads. Advertising viewers were generally similar in characteristics to travellers as a whole, which is to be expected since the survey population closely paralleled the target audience for the advertising.

The main exception is that those who saw the CTC advertising were more apt to have friends and relatives living in Canada. This is not really surprising, since the advertising was likely more salient to people with friends in Canada.

	All Respondents (n=1001)	Saw CTC Television Ads (n=230)
Region		
South East	16%	15%
London	16%	16%
North West / Merseyside	11%	13%
South West	8%	13%
Yorkshire & Humberside	7%	8%
West Midlands	10%	9%
Eastern	9%	6%
Scotland	8%	8%
East Midlands	7%	6%
Wales	5%	2%
North East	4%	4%
Social Class		
A	10%	8%
B	31%	31%
C1	36%	35%
C2	17%	19%
D	5%	6%
E	1%	1%
Gender		
Male	50%	55%
Female	50%	45%
Age		
25-29	15%	15%
30-34	14%	15%
35-44	29%	31%
45-54	24%	21%
55-64	19%	17%
Work Status		
Working Full Time (30+ hours/week)	70%	71%
Working Part Time (8 to 29 hours/week)	15%	14%
Housewife	6%	5%
Retired	6%	7%
Unemployed	1%	2%
Student	1%	1%

	All Respondents (n=1001)	Saw CTC Television Ads (n=230)
Marital Status		
Married or living together	75%	77%
Single	17%	16%
Divorced/Widowed/Separated	8%	7%
Have Children Under 18 in Household		
Yes	40%	42%
Have Close Friends or Relatives Living in Canada		
Yes	32%	44%
Highest Level of Education		
None	9%	10%
GCSE / 0-Level / CSE	18%	15%
Vocational Qualifications	32%	33%
A-Level or equivalent	12%	17%
Bachelor Degree or Equivalent	16%	17%
Masters/PhD or Equivalent	9%	6%
Other	4%	3%
Annual Household Income		
£20,000 to £24,999	16%	16%
£25,000 to £29,999	16%	19%
£30,000 to £39,999	24%	26%
£40,000 to £49,999	18%	17%
£50,000 to £69,999	14%	13%
£70,000 or over	12%	8%

Exhibit 23 *– Audience Demographics*

7. Conclusion

The evaluation results show that the CTC television campaign had an excellent reach and a positive impact. Almost a quarter of U.K. respondents recalled seeing the CTC television ads, which suggests coverage of close to 2.3 million long-haul travellers with above average incomes.

The advertising was well received by viewers, with 94 per cent who rated it as visually appealing, 91 per cent who felt it was interesting, and 81 per cent who said it was informative. In addition, almost three-quarters indicated that the advertising made them feel more positive about Canada as a vacation destination, and over two-thirds felt the ads made them more likely to vacation in Canada.

The study results also point to some key successes in generating immediate audience response. Approximately 12 per cent of all advertising viewers sought further information on travelling to Canada, while 1 per cent actually took or booked an immediate trip. A full assessment of the trips and revenues generated by the campaign will be obtained through a conversion study slated for later this year.

Awareness of Canada stands at 20 per cent in this market, with 8 per cent (or 791,000 long-haul travellers) likely to visit in the next year. However, without a pre-advertising baseline, it is difficult to ascertain whether the advertising actually improved these indicators in the market as a whole. What the study does show is that the advertising significantly enhanced awareness of Canada as a travel destination and boosted travel intentions *among those who saw it*. There is also evidence to suggest that it positively influenced the way *viewers* perceived Canada, with inroads made in positioning Canada as a trendy, exciting destination.

The study also shows that the "Canada" brand tends to dominate in the U.K., both in terms of advertising and destination awareness. The provincial partners obviously still have some awareness-building to do if they wish to increase recognition of their specific brands in this marketplace.

Appendix I – Advertising Evaluation Questionnaire

Hello, my name is _____ from _____, a company that specializes in marketing research. Today we are talking to people across the U.K. about pleasure travel. I am not trying to sell you anything. I would just like to get your opinions. This will only take about 10 minutes of your time.

SCREENER:

1) RECORD REGION: **DO NOT ASK.**

North East 1
Yorkshire / Humberside 2
East Midlands 3
Eastern 4
Greater London 5
South East 6
South West 7
West Midlands 8
North West/Merseyside 9
Wales 10
Scotland 11

2) RECORD GENDER: **DO NOT ASK.**

Male 1
Female 2

3) In the past three years, that is since February 2000, have you taken a holiday trip by plane, to somewhere outside of Europe and the Mediterranean for four nights or longer? Please include trips to visit friends and relatives and business trips on which you combined business with a holiday trip.

Yes 1
No 2

4) In the next two years, that is before February 2005, how likely is it that you will take a holiday trip by plane somewhere outside Europe and the Mediterranean for 4 nights or longer? Are you: **READ LIST. SINGLE RESPONSE**.

Definitely going to take such a trip 5
Very likely to take such a trip 4
Somewhat likely to take such a trip 3
Not very likely to take such a trip **OR** 2
Not at all likely to take such a trip 1

5) In which of the following age categories do you belong? **READ LIST. SINGLE RESPONSE.**

Under 18	1	-> TERMINATE
18-24	2	
25-29	3	
30-34	4	
35-44	5	
45-54	6	
55-64	7	
65-74	8	
75 and over	9	
DO NOT READ:		
Refused	99	**-> TERMINATE**

6) Is your annual household income before taxes above or below £20,000 pounds per year?

£20,000 and above	1	
Below £20,000	2	
Don't Know / Refused	9	**-> TERMINATE**

IF (Q5 = 2, 8 OR 9) OR (Q6 = 2) OR [(Q3 = 2) AND (Q4 = 1 TO 3)] -> TERMINATE

IN OTHER WORDS, ONLY PAST/POTENTIAL TRAVELLERS (Q3=1) OR (Q4=4 OR 5), AGED 25 TO 64, EARNING MEDIAN OR ABOVE INCOMES CONTINUE WITH MAIN SURVEY

MAIN SURVEY:

7a) What destination or place first comes to mind when you think about taking a holiday trip outside Europe and the Mediterranean? **DO NOT READ.**

7b) What other places come to mind for a holiday trip outside Europe and the Mediterranean? **DO NOT READ. RECORD SPECIFIC MENTIONS OF CANADIAN PROVINCES AND CITIES IN APPROPRIATE CATEGORIES. PROBE:** Any others?

	7A First Mention	7B Other Mentions
Canada (general mention)	1	1
British Columbia (Vancouver, Victoria, Whistler)	2	2
Alberta (Calgary, Edmonton, Banff, Jasper)	3	3
Prairie Provinces (Saskatchewan, Regina, Manitoba, Winnipeg)	4	4
Ontario (Toronto, Ottawa, Niagara Falls)	5	5
Québec (Montréal, Québec City)	6	6
Canada's East Coast/Atlantic Canada/Maritimes (general mention)	7	7
-New Brunswick (Fredericton, St. John)	8	8
-Newfoundland (St. John's, Labrador)	9	9
-Nova Scotia (Halifax)	10	10
-Prince Edward Island (Charlottetown)	11	11
Northern Canada (general mention)	12	12
-Yukon	13	13
-Nunavut	14	14
-Northwest Territories	15	15
Rocky Mountains	16	16
Other Canada	17	17
United States	18	18
Mexico	19	19
Caribbean/West Indies	20	20
South/Central America	21	21
Africa (general mention)	22	22
-South Africa	23	23
-Other Africa	24	24
Australia/New Zealand	25	25
Other South Pacific	26	26
Asia/Far East/Pacific (general mention)	27	27
-Hong Kong/China	28	28
-Taiwan	29	29
-Japan	30	30
-South-east Asia (Thailand, Singapore, Malaysia, Philippines)	31	31
-Other Asia/ Far East/Pacific	32	32
Middle East	33	33
Other	97	97
None	98	98
Don't Know	99	99

MAIN SURVEY:

7a) What destination or place first comes to mind when you think about taking a holiday trip outside Europe and the Mediterranean? **DO NOT READ.**

7b) What other places come to mind for a holiday trip outside Europe and the Mediterranean? **DO NOT READ. RECORD SPECIFIC MENTIONS OF CANADIAN PROVINCES AND CITIES IN APPROPRIATE CATEGORIES. PROBE:** Any others?

	7A First Mention	7B Other Mentions
Canada (general mention)	1	1
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Ontario (Toronto, Ottawa, Niagara Falls)	5	5
Québec (Montréal, Québec City)	6	6
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-New Brunswick (Fredericton, St. John)	8	8
-Newfoundland (St. John's, Labrador)	9	9
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-Northwest Territories	15	15
Rocky Mountains	16	16
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United States	18	18
Mexico	19	19
Caribbean/West Indies	20	20
South/Central America	21	21
Africa (general mention)	22	22
-South Africa	23	23
-Other Africa	24	24
Australia/New Zealand	25	25
Other South Pacific	26	26
Asia/Far East/Pacific (general mention)	27	27
-Hong Kong/China	28	28
-Taiwan	29	29
-Japan	30	30
-South-east Asia (Thailand, Singapore, Malaysia, Philippines)	31	31
-Other Asia/ Far East/Pacific	32	32
Middle East	33	33
Other	97	97
None	98	98
Don't Know	99	99

8) For which destinations or places have you seen or heard advertising relating to travel or holidays in the last two months? **PROBE:** Any others? **DO NOT READ. CODE THE FIRST MENTION IN THE FIRST COLUMN AND THE OTHER MENTIONS IN THE SECOND COLUMN. RECORD SPECIFIC MENTIONS OF CANADIAN PROVINCES AND CITIES IN APPROPRIATE CATEGORIES.**

	8A First Mention	8B Other Mentions
Canada (general mention)	1	1
British Columbia (Vancouver, Victoria, Whistler)	2	2
Alberta (Calgary, Edmonton, Banff, Jasper)	3	3
Prairie Provinces (Saskatchewan, Regina, Manitoba, Winnipeg)	4	4
Ontario (Toronto, Ottawa, Niagara Falls)	5	5
Québec (Montréal, Québec City)	6	6
Canada's East Coast/Atlantic Canada/Maritimes (general mention)	7	7
-New Brunswick (Fredericton, St. John)	8	8
-Newfoundland (St. John's, Labrador)	9	9
-Nova Scotia (Halifax)	10	10
-Prince Edward Island (Charlottetown)	11	11
Northern Canada (general mention)	12	12
-Yukon	13	13
-Nunavut	14	14
-Northwest Territories	15	15
Rocky Mountains	16	16
Other Canada	17	17
United States	18	18
Mexico	19	19
Caribbean/West Indies	20	20
South/Central America	21	21
Africa (general mention)	22	22
-South Africa	23	23
-Other Africa	24	24
Australia/New Zealand	25	25
Other South Pacific	26	26
Asia/Far East/Pacific (general mention)	27	27
-Hong Kong/China	28	28
-Taiwan	29	29
-Japan	30	30
-South-east Asia (Thailand, Singapore, Malaysia, Philippines)	31	31
-Other Asia/Far East/Pacific	32	32
Middle East	33	33
Europe	34	34
Other	97	97
None	98	98
Don't Know	99	99

8) For which destinations or places have you seen or heard advertising relating to travel or holidays in the last two months? **PROBE:** Any others? **DO NOT READ. CODE THE FIRST MENTION IN THE FIRST COLUMN AND THE OTHER MENTIONS IN THE SECOND COLUMN. RECORD SPECIFIC MENTIONS OF CANADIAN PROVINCES AND CITIES IN APPROPRIATE CATEGORIES.**

	8A First Mention	8B Other Mentions
Canada (general mention)	1	1
British Columbia (Vancouver, Victoria, Whistler)	2	2
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Ontario (Toronto, Ottawa, Niagara Falls)	5	5
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-Nova Scotia (Halifax)	10	10
-Prince Edward Island (Charlottetown)	11	11
Northern Canada (general mention)	12	12
-Yukon	13	13
-Nunavut	14	14
-Northwest Territories	15	15
Rocky Mountains	16	16
Other Canada	17	17
United States	18	18
Mexico	19	19
Caribbean/West Indies	20	20
South/Central America	21	21
Africa (general mention)	22	22
-South Africa	23	23
-Other Africa	24	24
Australia/New Zealand	25	25
Other South Pacific	26	26
Asia/Far East/Pacific (general mention)	27	27
-Hong Kong/China	28	28
-Taiwan	29	29
-Japan	30	30
-South-east Asia (Thailand, Singapore, Malaysia, Philippines)	31	31
-Other Asia/Far East/Pacific	32	32
Middle East	33	33
Europe	34	34
Other	97	97
None	98	98
Don't Know	99	99

IF (Q8a = 1 TO 17) OR (Q8b = 1 to 17) -> SKIP TO Q10

9) Do you remember seeing or hearing any advertising for Canada or places in Canada within the last 2 months?

Yes	1	
No	2	**->SKIP TO Q13a**
Don't Know	9	**->SKIP TO Q13a**

10a) In which media do you remember seeing or hearing the ads for Canada or places in Canada in the last 2 months? **DO NOT READ LIST. MULTIPLE RESPONSE.**

On television	1
On the radio	2
In the newspaper	3
On posters or billboards	4
In magazines	5
In the mail	6
At the cinema	7
On the Internet	8
Other	97
Don't Know	99

IF Q10a = 1 -> SKIP TO Q11

10b) In the last 2 months, do you remember seeing any ads for Canada on television?

Yes	1	
No	2	**->SKIP TO Q13a**
Don't Know	9	**->SKIP TO Q13a**

SAW TV ADS FOR CANADA

11) What images do you recall seeing in the television advertising for Canada? **PROBE:** Do you remember anything else? **DO NOT READ. MULTIPLE RESPONSE.**

- Anne of Green Gables 1
- Arches/rock formations 2
- Banff/National Parks 3
- Beach 4
- Boats 5
- Cities/skyline 6
- CN Tower 7
- Coastline 8
- Cruises 9
- Cuisine/fine dining 10
- Gardens 11
- Golf/golf course 12
- Hiking 13
- Hockey 14
- Horses/men on horses 15
- Hotel and bellboy 16
- Icebergs 17
- Kayaks/canoes 18
- Lakes/rivers/Lake Louise 19
- Lighthouse 20
- Motorcycling 21
- Mountains/Rocky Mountains 22
- Mountie 23
- Natives 24
- Niagara Falls/waterfalls 25
- Rodeo/Calgary Stampede 26
- Scenery/outdoor scenes 27
- Sea plane over water 28
- Ships/tall ships 29
- Totem, native art 30
- Whales 31
- Wildlife 32
- Alberta/Calgary 33
- British Columbia/Vancouver/Victoria 34
- Ontario/Toronto 35
- Canada's East Coast/Atlantic Canada 36
- Air Transat/plane/pilots 37
- Globespan packages 38
- Travel Pack packages 39
- Discover our true nature 40
- Canadian Tourism Commission maple leaf logo 41
- Free telephone number (0-800-#) 42
- www.playincanada/play canada website 43
- Symbol for "play" (>) 44
- Many colourful images of Canada 45
- Other (specify) _____ 97
- Don't recall anything specific 99

12) Which provinces or destinations do you remember seeing or hearing about in the television advertising for Canada? **DO NOT READ. MULTIPLE RESPONSE. PROBE:** Any others?

British Columbia	1
Vancouver	2
Victoria	3
Whistler	4
Alberta	5
Calgary	6
Edmonton	7
Lake Louise	8
Banff	9
Rockies/Rocky Mountains	10
Ontario	11
Toronto	12
Niagara Falls	13
Canada's East Coast/Atlantic Canada	14
New Brunswick	15
Newfoundland/Labrador	16
Nova Scotia	17
Prince Edward Island	18
Other (specify):_____	97
Don't Know	99

ALL RESPONDENTS

13a) In the last two months, do you remember seeing a series of television ads showing many colourful images of Canada. Each ad featured a different destination in Canada, including British Columbia, Alberta, Ontario and Canada's East Coast. The ads invited you to play in Canada and Discover Our True Nature. The ads also gave prices for holiday packages to Canada and had a free telephone number that you could call to obtain a free holiday guide. Please tell me if you have definitely seen these ads, think you have seen them or have not seen them?

Definitely saw	1	
Think they saw	2	
Have not seen	3	**->SKIP TO Q21**
Don't Know	9	**->SKIP TO Q21**

SAW CTC TV ADS

13b) Thinking about the television ads you saw for Canada, please tell me whether you strongly agree, somewhat agree, somewhat disagree or strongly disagree with the following statements.

The advertisements were... (READ) (ROTATE ITEMS)	*Strongly Agree*	*Somewhat Agree*	*Somewhat Disagree*	*Strongly Disagree*	*Don't Know*
Interesting	4	3	2	1	9
Unique	4	3	2	1	9
Boring	4	3	2	1	9
Visually Appealing	4	3	2	1	9
Unmemorable	4	3	2	1	9
Informative	4	3	2	1	9
Better than other travel ads I have seen on television	4	3	2	1	9
The advertisements ... (READ) (ROTATE ITEMS)					
Made me aware of new vacation opportunities in Canada	4	3	2	1	9
Made me feel more positive about Canada as a holiday destination	4	3	2	1	9
Made me more likely to vacation in Canada	4	3	2	1	9
Made me switch to another channel	4	3	2	1	9

15) Since seeing the television advertising, have you sought any additional information on travelling in Canada?

Yes..... 1
No..... 2 **->SKIP TO Q17**
Don't Know..... 9 **->SKIP TO Q17**

16) Did you do any of the following as a result of seeing the advertising for Canada? **READ LIST. RECORD YES OR NO FOR EACH.**

	YES	**NO**
Called the free telephone number in the ad	1	2
Visited the internet site indicated in the ad	1	2
Visited other internet sites relating to Canada	1	2
Consulted a Canada travel guide	1	2
Talked to a travel agent about Canada	1	2
Called a tour operator shown in the tv ad (e.g., Travel Pack, Globespan)	1	2

17) Thinking back a few months to before you saw the television advertising we just discussed, had you planned to take a trip to Canada? **DO NOT PROMPT. IF YES, ASK:** Were you definitely planning a trip to Canada or only considering it?

Yes, definitely planning	1	
Yes, considering it	2	
No, not planning	3	
DK/NR	9	

18) And since seeing the advertising for Canada, have you taken or booked a pleasure trip to Canada?

Yes	1	
No	2	**->SKIP TO Q21**
Don't know	9	**->SKIP TO Q21**

19) Did you purchase a package that included two or more travel services for a single price, for example, flight and accommodation, or hotel and entertainment?

Yes	1	
No	2	**->SKIP TO Q21**
Don't know	9	**->SKIP TO Q21**

20) And did you purchase one of the packages shown in the television ads for Canada?

Yes	1	
No	2	
Don't know	9	

ALL RESPONDENTS

21) How likely are you to visit Canada in the next twelve months? **READ LIST. SINGLE RESPONSE.**

Definitely	5	**->SKIP TO Q23**
Very Likely	4	**->SKIP TO Q23**
Somewhat Likely	3	**->SKIP TO Q23**
Not Very Likely	2	
Not at all Likely	1	
DO NOT READ:		
Don't Know	9	**->SKIP TO Q25**

22) Why are you not likely to visit Canada? **DO NOT READ LIST. MULTIPLE RESPONSE. PROBE:** Are there any other reasons?

Too expensive to go to Canada (in general) 1
Airfare too expensive 2
Accommodations too expensive 3
Packages too expensive 4
Poor exchange rates 5

Too hard to get there 6
Too far to travel / flight too long 7
Too big/attractions too far apart 8

Poor weather/too cold/prefer warmer places 9
No beaches/beach resorts 10
Prefer more exotic places 11

Don't know enough about it 12
Nothing there that appeals to me 13
Nothing to see or do there 14
Nothing different or unique there 15
Not exciting / too boring 16
A place for older people 17

Other destinations I want to visit more 18
Been there before and want to go somewhere else 19
Been there before and didn't like it 20
Just went there 21

Poor economy/waiting for economy to improve 22
Worried about losing my job 23
Can't afford to travel/too many other expenses 24

Fear of flying 25
Fear of terrorism 26
Fear of war in Iraq 27

Don't want to be away from my family/home 28
Personal (illness / family problems/ pregnant/young children) 29
Too busy/can't get away from work or school 30
Language barriers ..... N/A

Other (specify: _____) 97
Don't Know 99

SKIP TO Q25

LIKELY TO VISIT CANADA

23a) If you were to take a future holiday trip to Canada, please tell me how likely you would be to take each of the following types of trips. Would you say that you are very likely, somewhat likely or not likely to take… **READ LIST. ROTATE ITEMS. RECORD ONE RESPONSE FOR EACH ITEM.**

	Very Likely	*Somewhat Likely*	*Not Likely*	*Don't Know*
A trip to a big city	3	2	1	9
A touring trip to a number of destinations	3	2	1	9
An outdoors adventure trip	3	2	1	9
A trip to enjoy nature	3	2	1	9
A culture or history trip	3	2	1	9
An aboriginal culture trip	3	2	1	9
A trip to enjoy winter sports and winter scenery	3	2	1	9

23b) And if you were to take a trip to Canada, how likely would you be to visit each of the following destinations – very likely, somewhat likely, or not likely? **READ LIST. ROTATE ITEMS.**

	Very Likely	*Somewhat Likely*	*Not Likely*	*Don't Know*
Ontario	3	2	1	9
Alberta	3	2	1	9
British Columbia	3	2	1	9
Canada's East Coast	3	2	1	9
New Brunswick	3	2	1	9
Newfoundland	3	2	1	9
Nova Scotia	3	2	1	9
Prince Edward Island	3	2	1	9

24) Now I would like to ask you what type of travel destination you consider Canada to be. How would you rate Canada as a place to go for each of the following: For each item, please tell me if you feel Canada is excellent, very good, good, fair or poor. **READ LIST. ROTATE ITEMS. REPEAT SCALE WHERE NECESSARY. RECORD ONE RESPONSE FOR EACH ITEM.**

	Excellent	*Very Good*	*Good*	*Fair*	*Poor*	*Don't Know*
Finding excitement and adventure	5	4	3	2	1	9
Having fun and being entertained	5	4	3	2	1	9
Experiencing history and culture	5	4	3	2	1	9
Learning and exploring	5	4	3	2	1	9
Resting and relaxing						
Finding intimacy and romance	5	4	3	2	1	9
Being active						
Connecting with nature	5	4	3	2	1	9
Enjoying the great outdoors	5	4	3	2	1	9
Enjoying the good life and being pampered	5	4	3	2	1	9
Experiencing cosmopolitan cities	5	4	3	2	1	9
Experiencing a popular, trendy place	5	4	3	2	1	9
Seeing something you've never seen before	5	4	3	2	1	9
Having lots of things to see and do	5	4	3	2	1	9
Getting value for your money	5	4	3	2	1	9
Creating once in a lifetime memories	5	4	3	2	1	9

ALL RESPONDENTS

DEMOGRAPHICS:

So that we can tabulate your responses, we would like to ask you some questions that would be used for statistical purposes only.

25) Do you have any close friends or relatives living in Canada at the present time?

Yes..... 1
No..... 2
Don't know..... 9

26) Including yourself, how many people are there in your household?

_____ Person(s) -> **IF Q26 SKIP TO Q28**

(99) Refused

27) How many are less than 18 years of age?

_____ Person(s)

(99) Refused

28) What is your marital status? **READ LIST. SINGLE RESPONSE.**

Married or living with someone 1
Single 2
Divorced / separated 3
Widow / widower 4
DO NOT READ:
Refused 9

29) What is the highest level of educational qualifications that you have completed? **DO NOT READ. SINGLE RESPONSE.**

No qualifications 1
CSE / Standard Grades / O Grades / O Levels / Lowers 2
ONC / OND 3
Highers 4
Certificate of Sixth Year Studies (CSYS) / A Levels 5
HNC / HND 6
City & Guilds 7
NVQ / SVQ / Scotvec 8
Diploma / Degree from College of Further / Higher Education 9
First Degree from a University 10
Second Degree from a University 11
Other 12
Don't Know/Refused 99

30) Are you..... **(READ LIST)**

Working full-time (30+ hours per week) 1
Working part-time (8 to 29 hours per week) 2
Working in the home/housewife/husband 3
Retired 4
Unemployed 5
A student 6
DO NOT READ:
Other (including disabled) 7
Refused 9

31) To ensure that we have a representative sample, could you tell me the occupation of the CHIEF WAGE EARNER of the household? **SINGLE RESPONSE. PROBE AS APPROPRIATE TO CLASSIFY:**

a) What is their position at work/rank/grade?
b) What industry do they work in?
c) Do they have any qualifications that are relevant to their job?
d) How many people are they responsible for at work?
e) ***IF UNEMPLOYED:*** *How long unemployed for?* ***IF LESS THAN 3 MONTHS, ASK ABOUT LAST JOB***
f) ***IF RETIRED:*** *Do they receive a private job related pension?* ***IF YES, ASK ABOUT THEIR LAST JOB***

CODE INTO SOCIAL CLASS:

A – Senior Management, Top Level Civil Servants 1
B – Middle Management, Small Business Owners 2
C1 – Junior Management 3
C2 – Skilled Manual Workers 4
D – Semi-Skilled / Unskilled Manual Workers 5
E – State-Dependent, Casual workers with no regular income 6
Refused 9

32) Which of these categories best describes your annual household income before taxes in 2002? Please include all wages, salaries, pensions and income from other sources. **READ LIST.**

£20,000 to £24,999 1
£25,000 to £29,999 2
£30,000 to £39,999 3
£40,000 to £49,999 4
£50,000 to £69,999 5
£70,000 to or more 6

DO NOT READ:

Don't Know / Refused 9

THESE ARE ALL THE QUESTIONS I HAVE.
THANK YOU FOR YOUR COOPERATION.